INTERNAL OPPORTUNITY

POSITION: **INVESTMENT ASSOCIATE**

DEPARTMENT: WESTERN CAPE REGIONAL OFFICE

REPORTS TO: **WESTERN CAPE REGIONAL MANAGER**

If you meet the above-mentioned inherent job requirements, please send your detailed CV to recruitment@tianaconsulting.co.za on or before the 06 August 2024 with reference Investment Associate – WC Regional Office clearly marked.

Role Summary

To screen and process regional applications in accordance with the organisation's policies and procedures. Additionally, process and refer applications that meet requirements to the Funds for further consideration and monitor the organisation investment portfolio within the Regional Office.

Outputs

- Performing eligibility screening of new applications for funding in terms of organisation's criteria and mandate.
- Perform commercial screening of applications in terms of organisation's commercial assessment, framework, and generate reports for assessed application, with recommendations on whether the applications should be accepted or rejected.
- Prepare financial analysis as part of the commercial screening process of new applications.
- Call applicants to request information and meet as well as advice applicants where applicable.
- Perform desk top research using search engines such as Google, INet Brigde, etc. to obtain industry information required in the assessment of applications.
- Identify risks on applications and make recommendations to Regional Manager in respect of way forward.
- Build networks in Western Cape and source good deal flow for the organisation'.
- Attend conferences and seminars that are part of the Pre-Investment Business Support.
- Resolve complaints that cannot be resolved by Product Advisor and provide Pre-Investment mentorship to applicants where necessary.
- Perform business valuations for applicants.
- Conduct post investment due diligence and monitoring of all investments in the organisation' iMbewu portfolio.
- Conduct due diligence on applications from existing investees for further funding and obtain approval from the relevant committees per the DOA.
- Provide and facilitate technical assistance and mentorship to all investees in conjunction with the POIU
- Conduct effective portfolio management to reduce the portfolio risk of the organisation' in conjunction with the POIU.
- Maintain CRM (customer relationship management) will all existing investees.

Experience / Skills Required

- 3 years' experience on 2 or more of the following areas: SME funding/deal making/ investment environment, business banking, venture capital environment and/or development finance.
- 3 years' experience in managing a SME portfolio.
- Good understanding of the investment process especially as it relates to SME funding.
- Basic understanding of the various investment instruments and deal structures applicable to a SME portfolio.
- Good working knowledge of key commercial statutes and regulations (e.g. Tax, Companies Act and BEE legislative environment).
- Ability to perform desk top analysis and risk assessments on applications and put forward compelling written recommendations for consideration.
- Ability to analyse and interpret financial statements.
- Working experience in due diligence appraisals.
- Ability to generate deal flow through own networks.
- PC literacy and competency in Microsoft Excel, Word, and PowerPoint.
- Good Presentation Skills and ability to communicate at all levels.
- Strong negotiating skills.
- Strong credit control / collections skills.

Qualification Requirements

- B Com (Finance, Accounting, Financial Management, Management Accounting) Degree.
- Postgraduate Commerce Degree will be a distinct advantage.

Personal Attributes/Behaviours/Attitudes

- Ability to maintain good relationships with clients.
- Ability to work in a team.
- Must be self-motivated,
- Ability to take initiative and make decisions.
- Interpersonal Skills.
- Attention to detail.
- Result orientation and deadline – driven.
- Exceptionally professional with outstanding business ethics.
- Time and task management.